

August 5, 2002

TO: Craig Cornell

FROM: Howard W. Bell, Jr.

RE: Interview notes

The following are excerpts from the notes that I took during our telephone interview in May. I have incorporated these excerpts in a draft Best Practices report that I am writing. Please verify that the following excerpts capture the essence of your practices at Kent State University.

Craig Cornell of Kent State University:¹

1) Stated that:

- a) Independent applicants have a lower error rate than dependent applicants on several selection criterion.
- b) Reporting of taxes paid is a source of error for a number of applicants:
 - i) Taxes paid versus taxes withheld are sometimes misreported.
 - ii) Parents sometimes report untaxed income incorrectly.
- c) Filers with incomes below a certain level should be reviewed for filing errors. For example, zero income filers (whether \$0 AGI or \$0 income) should be reviewed.
- d) Dependency status other than an age-based attribute (household size) can sometimes cause errors.

2) Observed that the QA tool:

- a) Provides schools with the freedom to analyze students and ensure that internal and external procedures are okay and that the school is compliant with federal programs.
- b) Is a very good tool now because it allows a school to do queries and import their unique verification queries.
- c) With the ability to do field-to-field comparisons a deeper level of analysis can be achieved.

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3) Said that the University:

- a) Uses staff training so that the staff knows where applicants have difficulties.
- b) Uses its Web site to provide students with answers to Frequently Asked Questions and alerts to potential problematic issues in financial aid.
- c) Uses high school tours/presentations to inform students, parents, and counselors how to complete the FAFSA form and how to avoid making errors.

Deleted: about the Pell Grant program

¹ Information identified in a May 14, 2002 telephone discussion with Craig Cornell of Kent State University.

- d) Uses workshops/counseling sessions for students to inform them how to complete the FAFSA and avoid making errors.
 - e) Uses publications like the Access to Education Guide that is 8 pages to inform its students.
 - f) Selects 13.63% of its Pell Grant applicants for verification versus the CPS 30%. The University is confident that the school is catching most of the errors.
- 4) Reported that the following selection criteria led to EFC changes 65% or more of the time for the verified populations. The number of verified persons in each case is greater than 100 persons.
- a) Reported parents' taxes paid is > 35% of AGI and AGI is not equal to 0 or is blank (parents of dependent students) – 81.2% EFC change
 - b) Reported taxes paid is > 35% of AGI and AGI is not equal to 0 or is blank (dependent students) – 86.6% EFC change
 - c) Student Worksheet C is > 50% of student total income (dependent students) – 75.2% EFC change
 - d) Parents' AGI is < 25% of total father income earned and mother income earned (dependent student) – 67.3% EFC change.
- 5) Recommended that queries should be:
- a) Shared amongst schools.
 - b) Grouped by type of school. For example community colleges, small four-year colleges, and large multi campus four-year universities.